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Poland

Oilseeds and Products

Rapeseed Production Revised Down 2003

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Report Highlights:

Polish rapeseed production will drop 12 due primarily to winter kill. Consequently imports will raise.

Includes PSD changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Warsaw [PL1], PL

Executive Summary	1
Rapeseed PS&D Table	2
Rapeseed Meal PS&D Table	3
Rapeseed Oil PS&D Table	4

Executive Summary

In its latest acreage and crop evaluation report, the Main Statistical Office (GUS), revised winter rapeseed planted area in Poland up to 475,000 hectares from the previous estimate of 401,000 hectares. The same report, however, for the first time this year, estimates winter rapeseed losses at 180,000 hectares or 38.1 percent of winter planted area. This MY's high overall winter killing is the largest since 1998, and only 12 percentage points smaller than losses in 1997 or 23 percentage points smaller than extremely high rapeseed losses in 1996. This year high winter losses are related to the severe long winter conditions which were described in our annual report (PL3008). GUS also estimated spring rapeseed sowing at 60,000 hectares, when combined with the winter crop, will total 360,000 hectares for the 2003 crop. The total harvested area is forecast to be 11.4 percent smaller than harvested in 2002.

GUS's mid-May crop evaluation showed that unfavorable sowing conditions last fall, winter killing, a late spring, and dry conditions at the end of April and beginning of May contributed to very poor crop conditions. These are the worst crop conditions over the last few years. As of mid-May overall winter rapeseed conditions were evaluated at 2.6 points on a 1 to 5 scale (1=very poor conditions, described as a disaster, while 5=very good crop condition), the lowest since 1997; while rapeseed conditions for 2001 and 2002 were evaluated at 3.6 and 3.5 points respectively.

High temperatures in June and almost no rainfall further reduced crop prospects. In some areas of Poland (Legnica province, Mid-West, and some areas of Kujawsko-Pomorskie, Central-North) plant growing conditions are currently described as a disaster due to a lack of water.

Based on the above factors we revised the rapeseed forecast for MY 2003/04 in our PSD. The rapeseed crop is reduced by 12 percent, down to 740,000 tons from previous 840,000 forecast. The reduced rapeseed production will result in increased imports estimated at 150,000 tons. Notwithstanding increased imports, it is expected that domestic rapeseed crushing will be reduced by 5 percent, down to 850,000 tons from the 915,000 tons estimated crushing for 2002/03 which will result in smaller rapeseed oil and meal production. Revised PSD tables for rapeseed, rapeseed meal and rapeseed oil are enclosed. No revisions are expected in other oilseed and products PSDs.

Rapeseed PS&D Table

PSD Table						
Country	Poland					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	447	447	449	449	0	535
Area Harvested	443	443	436	436	0	360
Beginning Stocks	44	44	0	0	10	10
Production	1064	1064	995	995	0	740
MY Imports	3	3	30	30	0	150
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	1	1	10	10	0	40
TOTAL SUPPLY	1111	1111	1025	1025	10	900
MY Exports	292	292	40	40	0	0
MY Exp. to the EC	100	100	15	15	0	0
Crush Dom. Consumption	770	770	915	915	0	850
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	49	49	60	60	0	50
TOTAL Dom. Consumption	819	819	975	975	0	900
Ending Stocks	0	0	10	10	0	0
TOTAL DISTRIBUTION	1111	1111	1025	1025	0	900
Calendar Year Imports	7	7	30	30	0	150
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	36	36	20	20	0	10
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Rapeseed Meal PS&D Table

PSD Table						
Country	Poland					
Commodity	Meal, Rapeseed				(1000 MT)(PERC ENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Crush	770	770	915	915	0	850
Extr. Rate, 999.9999	0.58961	0.58961	0.590164	0.590164	ERR	0.6
Beginning Stocks	33	33	10	10	30	30
Production	454	454	540	540	0	510
MY Imports	10	10	10	10	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	497	497	560	560	30	540
MY Exports	230	230	240	240	0	250
MY Exp. to the EC	230	230	240	240	0	250
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	257	257	290	290	0	270
TOTAL Dom. Consumption	257	257	290	290	0	270
Ending Stocks	10	10	30	30	0	20
TOTAL DISTRIBUTION	497	497	560	560	0	540
Calendar Year Imports	10	10	10	10	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	202	202	260	260	0	250
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Rapeseed Oil PS&D Table

PSD Table						
Country	Poland					
Commodity	Oil, Rapeseed				(1000 MT)(PERC ENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Crush	770	770	915	915	0	850
Extr. Rate, 999.9999	0.4	0.4	0.4	0.4	ERR	0.4
Beginning Stocks	21	21	20	20	40	40
Production	308	308	366	366	0	340
MY Imports	5	5	3	3	0	3
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	4	4	2	2	0	3
TOTAL SUPPLY	334	334	389	389	40	383
MY Exports	6	6	10	10	0	5
MY Exp. to the EC	2	2	2	2	0	2
Industrial Dom. Consum	218	218	239	239	0	258
Food Use Dom. Consump.	90	90	100	100	0	100
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	308	308	339	339	0	358
Ending Stocks	20	20	40	40	0	20
TOTAL DISTRIBUTION	334	334	389	389	0	383
Calendar Year Imports	5	5	3	3	0	3
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	3	3	10	10	0	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0